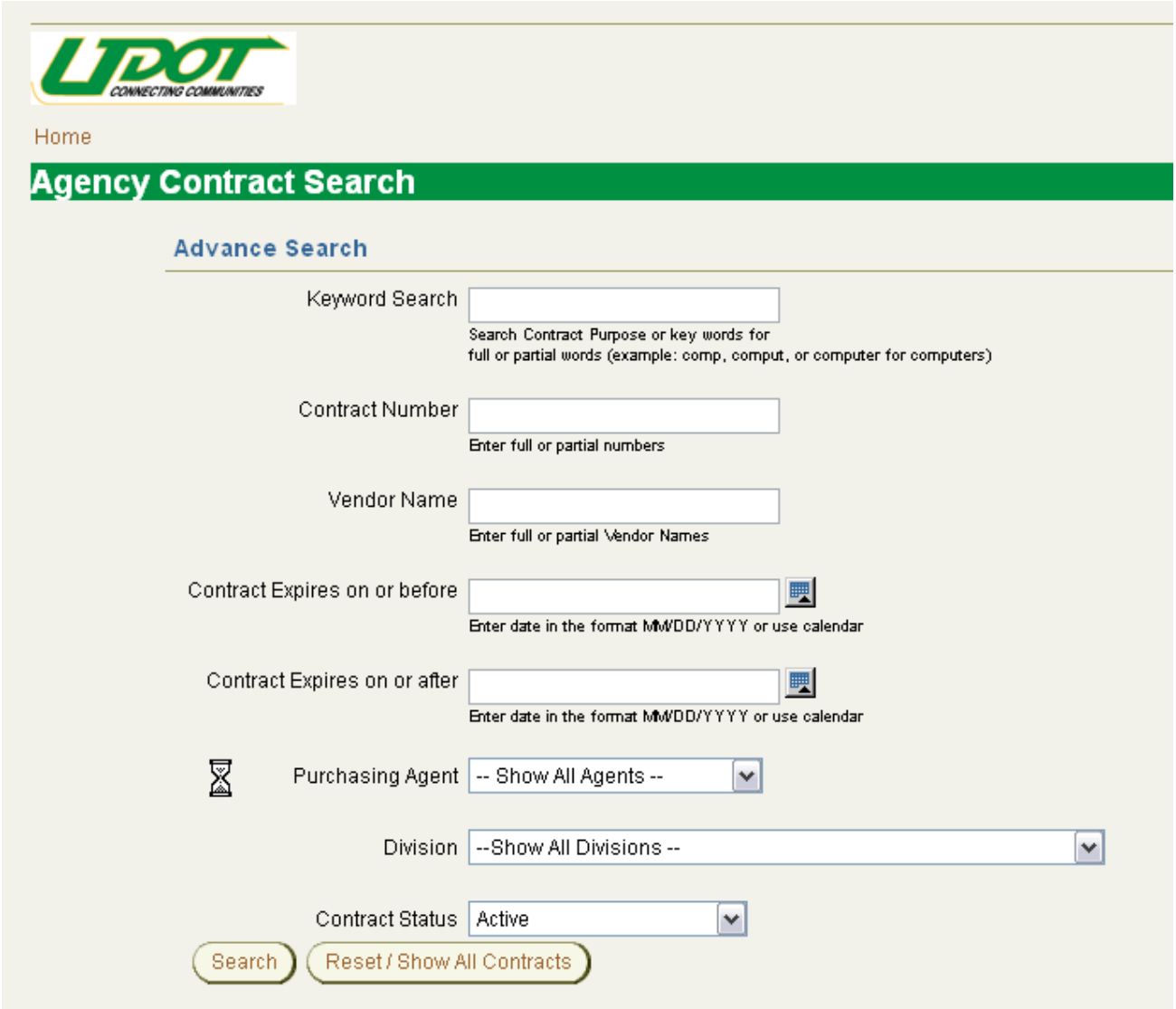
Agency Contract Web Availability & Procurement Services Online Introduction

Agency Contracts Website
https://app.udot.utah.gov/procurement/contracts
Statewide Contracts Website
http://purchasing.utah.gov/statewidecontracts/

Helpful Hints

- Utilize both sites, State and Agency, to find the contract you're looking for.
- Use simple, singular terms when searching for keywords; this will yield the best results.
- If you can't find a contract you know is out there, make sure you're searching by all agents, all divisions and all contract statuses. Also make sure any previously entered search criteria have been cleared.
- You may use multiple search fields or just one.
- For help in writing future contracts, search and use our expired contracts for a template of what you'll need in your new contracts



Procurement Services Online
Official Site : https://app.udot.utah.gov/procurement/pso
Use this to submit a real requisition to the purchasing agent you select.

Practice Site: https://devl.udot.utah.gov/test/htmldb/f?p=126
Use this site to enter practice data to familiarize yourself with the system.

All users will be given a "User Name" and "Password". If you are not yet set up in the system, click on "Request User ID." This request goes directly to the administrator, and the account will be, in most cases, created on the same day of the request.

For training purposes, we will enter information into the training Website,
https://devl.udot.utah.gov/test/htmldb/f?p=126

Please use one of the following log-ins:
User1, user2, user3, user4, user5, user6, user7, user8, user9 or user10

And use *changeme* as the password.

To submit a real requisition to a UDOT Procurement purchasing agent, go to:
https://app.udot.utah.gov/procurement/pso

Your User ID is the first part of your e-mail address omitting the @utah.gov, for example, tholt is my user ID if tholt@utah.gov is my e-mail address.

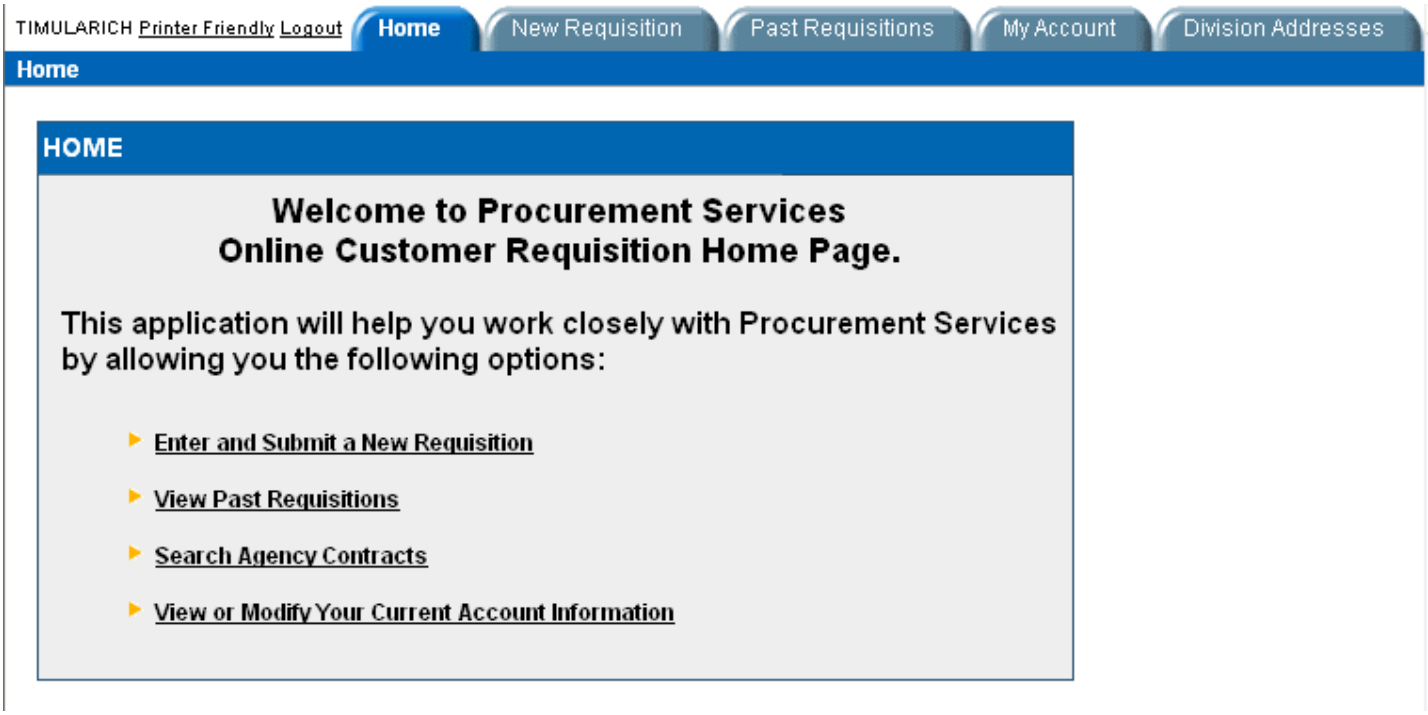
Use changeme as your password until you change a password to your personal preference. If you ever forget your User ID or Password, contact me and I'll reset everything.

Some guidelines to consider before selecting your purchasing method:

- **Any non-contract purchase up to $1000:** You may make your purchase with the assistance of procurement services. Select the best source for the job or product.
- **Any Sole-Source Purchase above $1000:** Please use Procurement Services Online to submit your online requisition to purchase any sole-sole source products or services. A purchase is considered sole source when there is only one distributor able to perform any given product or to manufacture patented or compatible products. Your purchasing agent will help walk you through the guidelines.
- **Any Items or Services on Agency or Statewide Contract:** You may simply make whatever purchase you need by cutting a PO in Finet or by using a P-Card if the contract terms allow this.
- **Any non-contract purchases above $5000:** You must submit an online requisition to a UDOT Procurement purchasing agent. Our office handles in-house all sole source purchases between $1000 and $30000 and all non-contract, non sole-source purchases between $5000 and $30000. For purchases greater than $30000, plan ahead to allow more time in the purchasing process. These purchases, as well as all new contracts and amendments, must be sent to the State Purchasing division for their analysis and approval.

- **Any purchase with which you need assistance:** If you have questions about any purchases, no matter which price category, you can use Procurement Services Online to request help in buying the item or service you need.

Once you have logged in, you will come to the Internal Customer (Division User) welcome screen where you will have the following options.



▷ Enter and Submit a New Requisition

Selecting this option will take you to an intuitive, user-friendly wizard that will walk you completely through the requisition process.

▷ View Past Requisitions

Once you have submitted an online requisition to a Procurement Services purchasing agent, you may track the status of that requisition with the help of automated time stamps on various actions related to the process.

▷ Search Agency Contracts

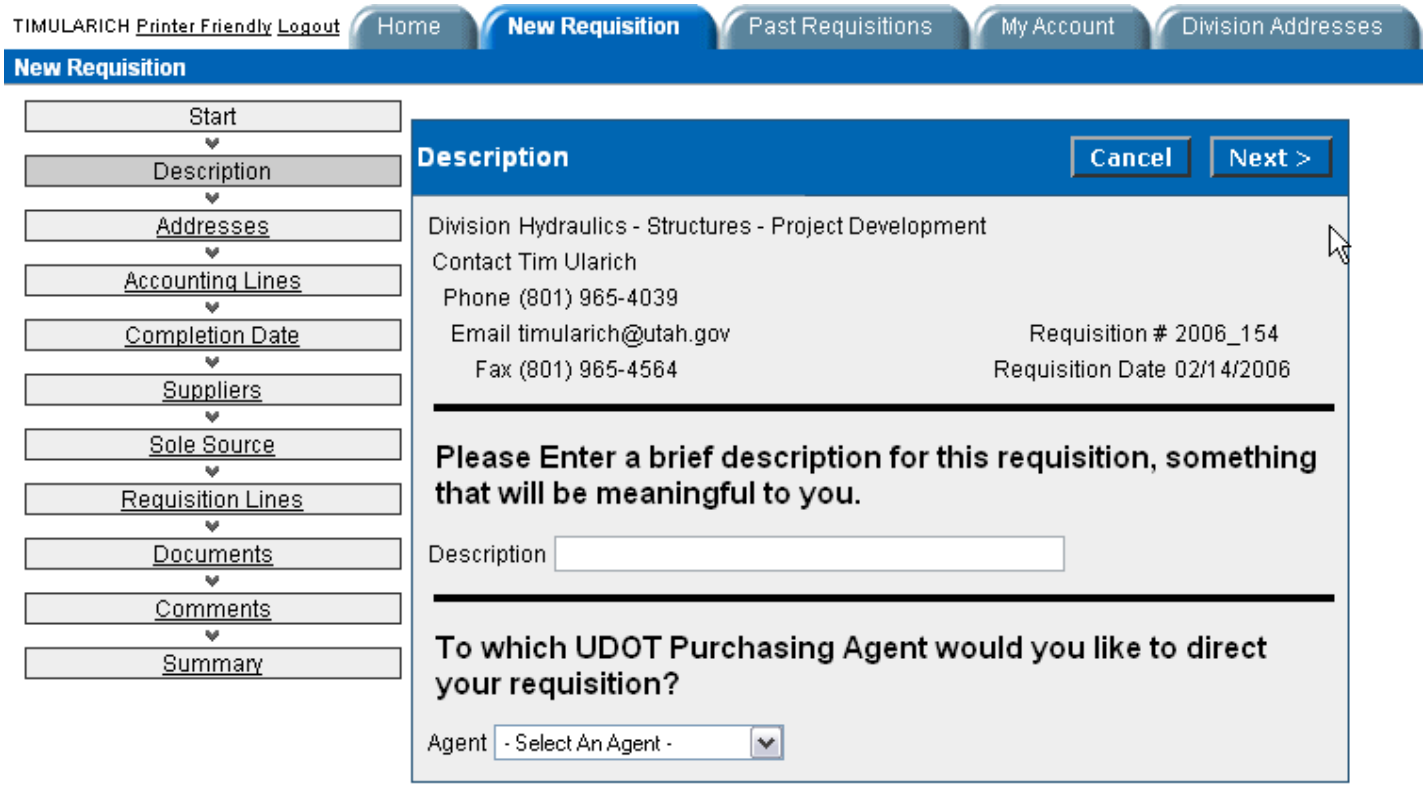
Without having to log out to search whether the items you're trying to purchase are on contract, you may click "Search Agency Contracts" and a new window will open allowing you to find what you're looking for and continue right where you left off in Procurement Services Online.

▷ View or Modify Your Current Account Information

This feature is continuously being enhanced. You may currently go in and change your title, phone number, e-mail address, password, etc., to keep your account up-to-date. Eventually, you will be able to set start and end dates for each position you hold at UDOT. Your log-in will always be the same; yet your purchasing history will be preserved within each department you served between each start and end date.

▷ Enter & Submit a New Requisition

This is where you'll find yourself once you have clicked "Enter & Submit a New Requisition."



This wizard will take you screen by screen, asking you the valid questions that must be asked during the requisition process. The navigation ladder at the left-hand side of the screen will tell you exactly where you've been, where you are and where you're heading. If at any time you need to stop the requisition and come back to it, you may simply click on whichever step you were on when you exited.

- Do keep in mind using the navigation ladder is only for backward movement through the wizard (to get back to information already saved and entered). Always make sure to hit "Next" to advance screens, as this is what saves the data you're entering.

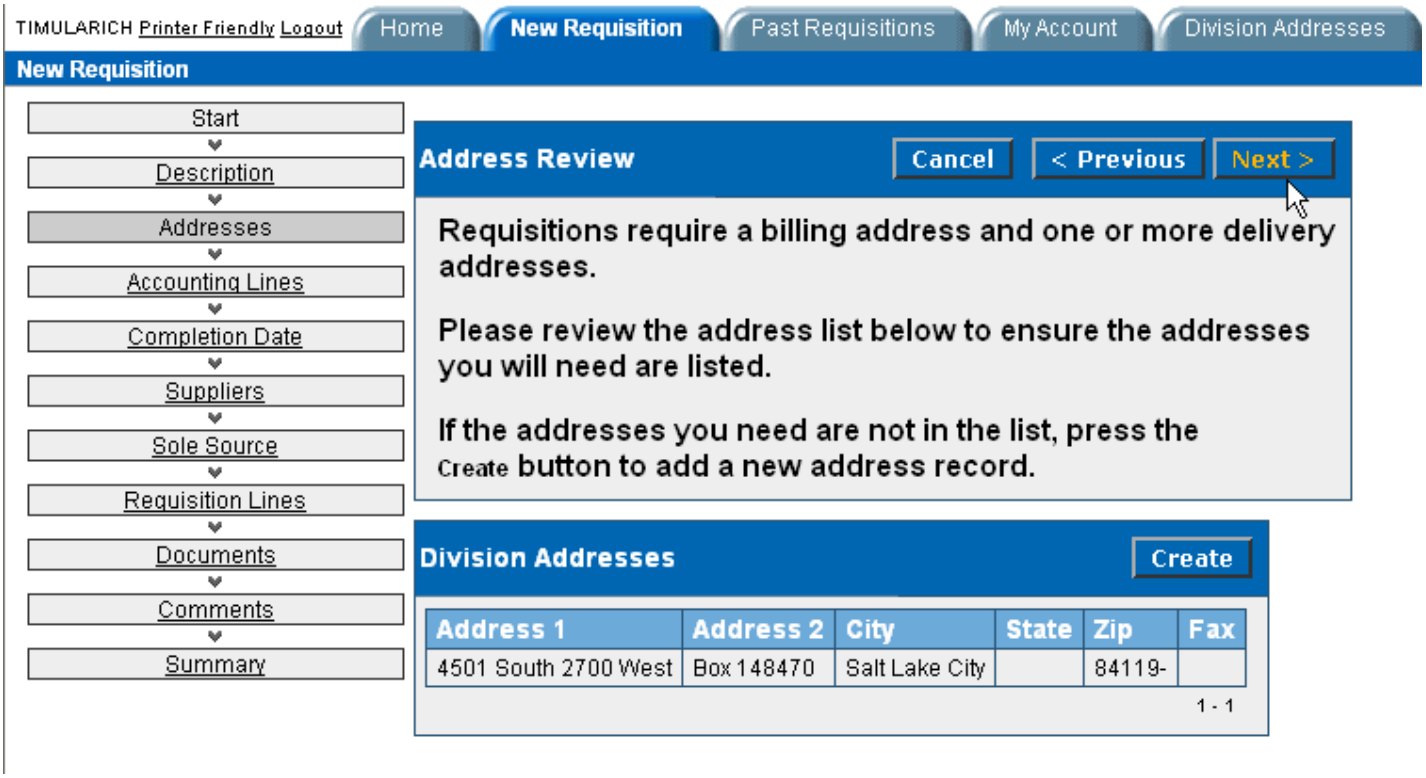
Field Descriptions (to explain what each field is asking for):

Please enter a brief description…
Providing a brief description of your requisition will help you identify your requisition when checking on its status after you've submitted it.

To which UDOT Purchasing Agent…
There are several ways to choose the purchasing agent to whom you should submit your requisition.

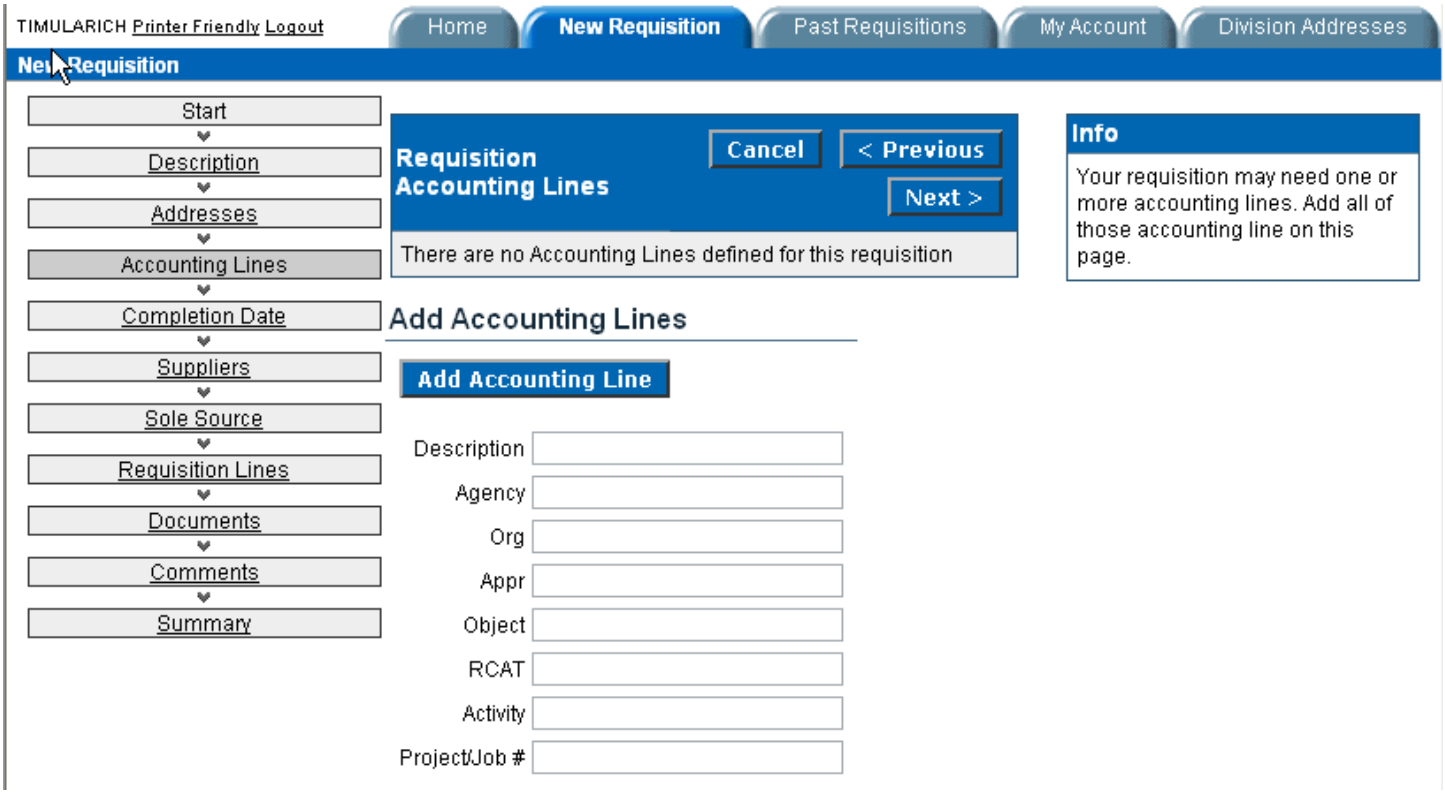
- Use the UDOT Procurement Services Directory to see which purchasing agent is responsible for the product or service you're requesting; and/or see which purchasing agent serves as the liaison for your region/department and ask them who they think you should submit the requisition to.
- Utilize the Commodity/Contact list attached to this packet. This is a more comprehensive of UDOT's most frequently purchased commodities that indicates which agent is responsible for purchasing or administrating contracts for each each product and service.
- Call anyone in the Procurement department, and we'll be able to help point you in the right direction.

Once you have selected an agent, click "Next."

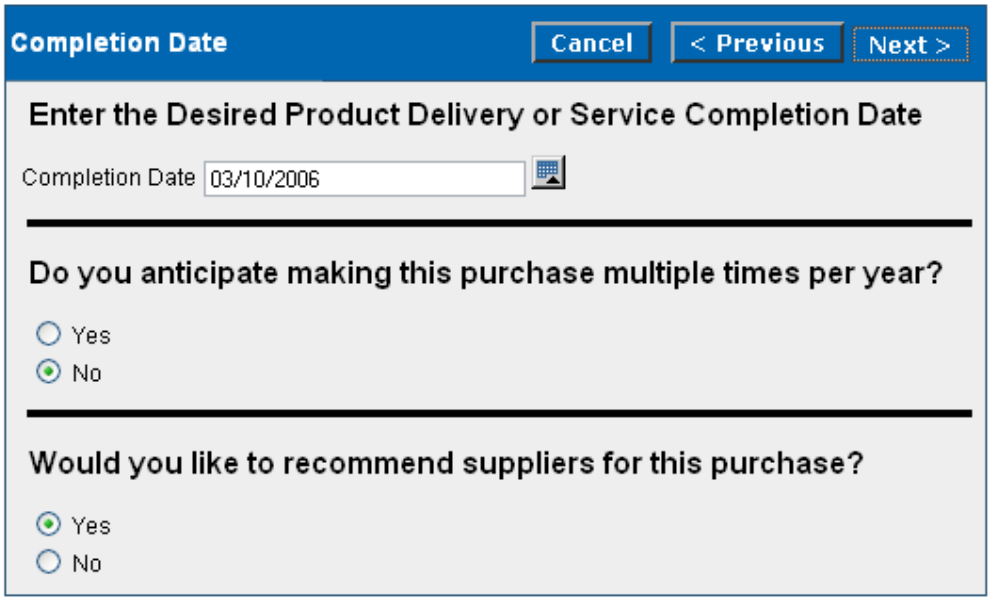


As you can see from this area, you will have the ability to provide one or more specific delivery addresses; as well as specify separate shipping and billing addresses.

- If the address you need isn't in the list, simply click on "Create" to add all the addresses you need.



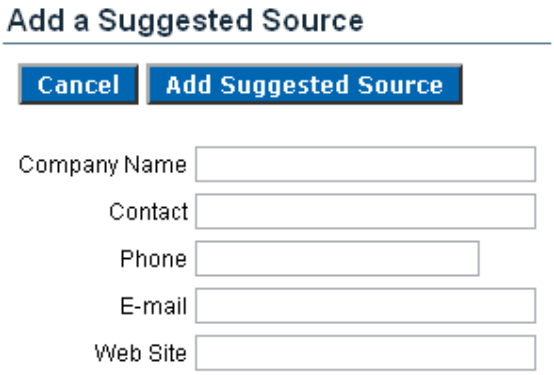
You can also specify as many accounting lines (associated with as many addresses) as you need. The description is to help you remember which accounting line belongs to which delivery address or line item. Make sure to click on “Add Accounting Line” for each line entered before clicking “Next.”



Enter the Desired Product Delivery or Service Completion Date:
You will be able specify exactly when you hope to have received the products you’re ordering, when you would like the service you’re requesting to be completed or when you would like a new contract to become active. Type in the date using the format DD/MM/YYYY or click on the calendar button to the right of the field.

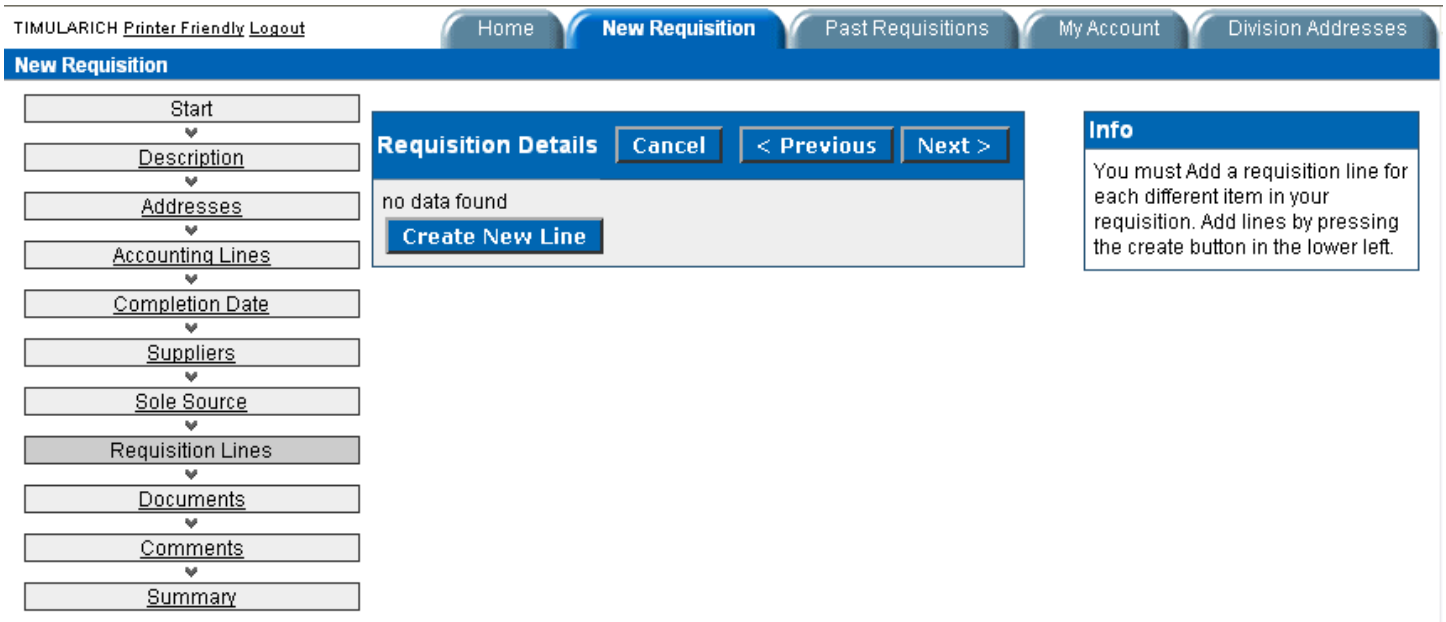
Do you anticipate making this purchase multiple times…
Indicating whether certain purchases may be made multiple times per year may alert our purchasing agents that a contract might be needed to save time and just as important, money, when purchasing goods and services.

Would you like to recommend suppliers…
It’s also important to know you may recommend sources for each purchase. This is especially helpful in areas outside of Salt Lake as we may not know who best provides these goods or services in the outer areas. Selecting yes will take you to the following screen where you can add as many suggested sources as you would like.



- As with adding accounting lines always make sure to click “Add Suggested Source” before clicking “Next.” You may enter as many sources as you like. Please provide as much contact information as you can. This speeds up the process greatly.

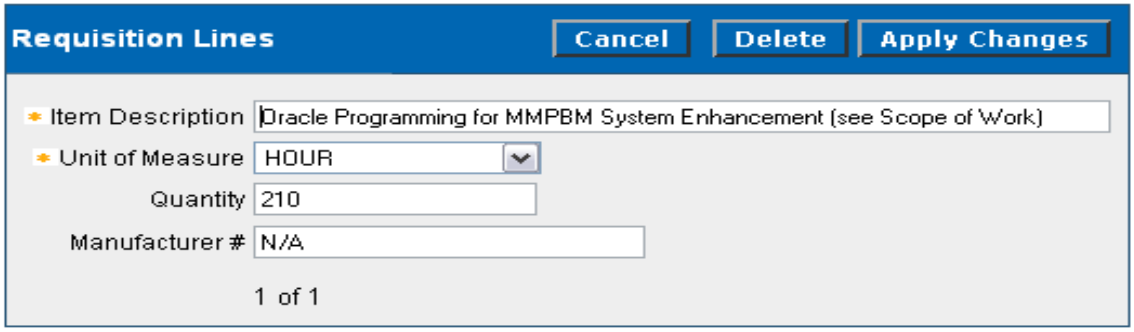
The next step is to add details for each of the items or services you are to purchase.

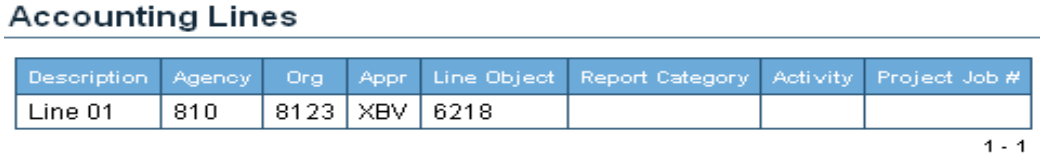


As each requisition line is entered, you will be able to specify (if choosing from more than one) which accounting lines and which delivery addresses coincide with each line of the requisition.

- First click “Create New Line” to enter a new requisition line.
- ***Item Description:*** List specific information for each item or service you need, including model or part numbers, color, size, etc.

- ***Unit of Measure:*** Use the pull-down menu to select the appropriate unit of measure for each item.
- ***Quantity:*** Make sure to enter the quantity that coincides with the unit of measure. For instance if your unit of measure is dozen, and you only need twelve items, enter 1 for dozen, not 12 for 12 dozen.
- ***Manufacturer #:*** This is very helpful information if you have it. This helps us be sure we're bidding on the exact items you're requesting.
- For each line item you enter, click "Create," which brings you to the next screen.

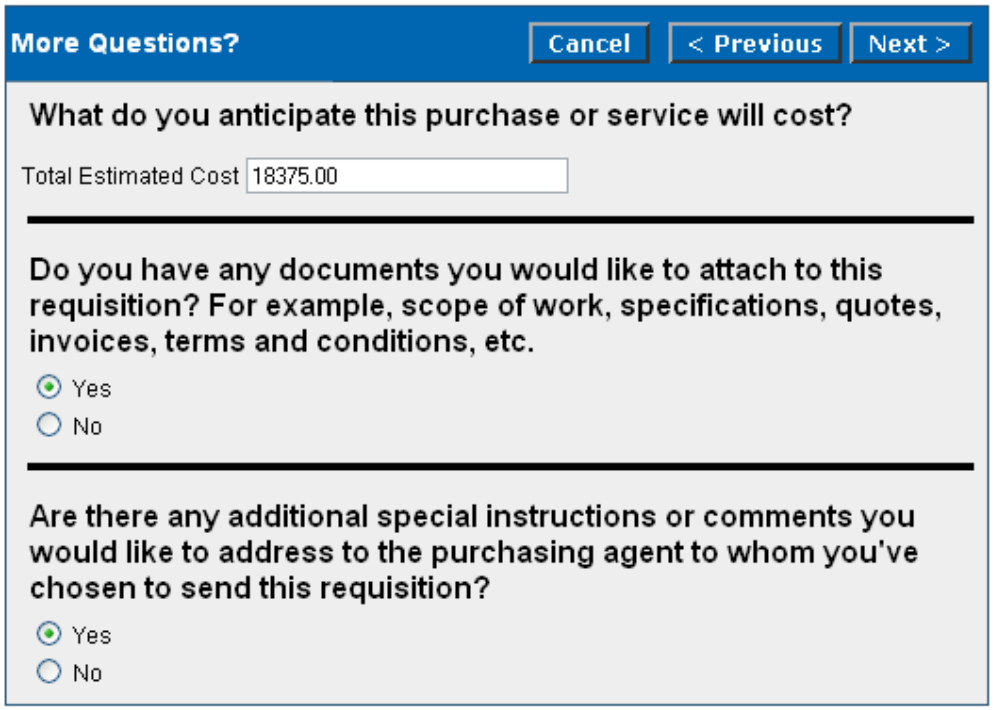




You see here three boxes. The first is the line-item information you've just entered. The second is where you can select different accounting lines and delivery addresses to go with different line items. The third is simply for your reference to show you which accounting lines you entered and can choose from.

- If you do not have multiple accounting lines and/or delivery addresses to specify, simply click "Apply Changes" in the first box.
- If you do have multiple accounting lines and/or to specify, change the accounting line or quantity in the first row, click "Apply Changes" in the second box; and repeat this process until you have specified all of your accounting and delivery information. Once complete, click "Apply Changes" in the first box to either add your next requisition line or to advance to the next step.

Once all requisition lines are entered, the wizard will wrap up by asking a few more important questions.

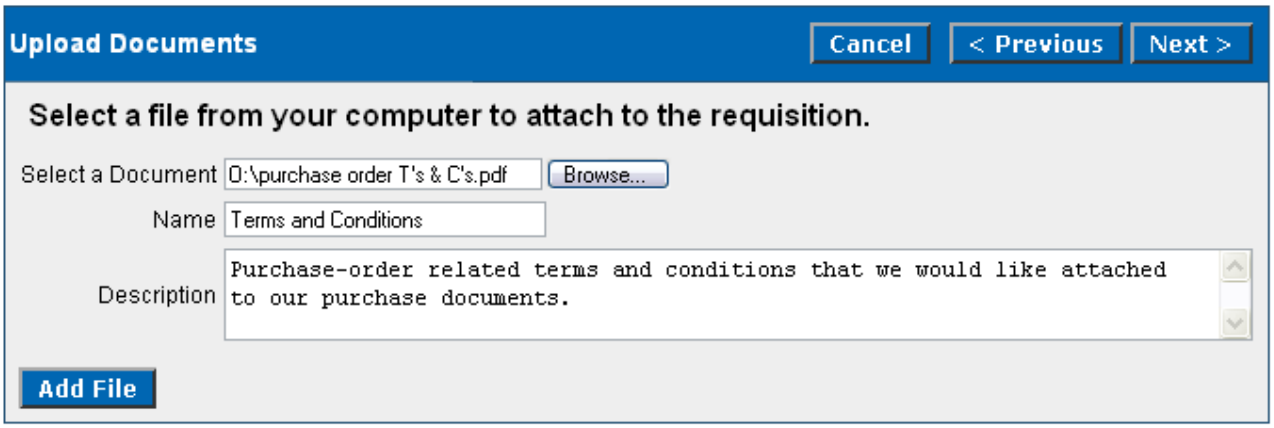


What do you anticipate this purchase or service will cost?
This lets us know two important things. What is your budgeted amount for this product or service; and are we bidding on the right product or service? If you budgeted $17000 and our lowest bid is $45000, we obviously need to get ahold of you.

Do you have any documents you would like to attach…
This is where you can attach any documents you have saved to your computer. Some relevant documents to consider are any quotes you've received, scope of work, specifications, drawings, etc. There is no limit to how many documents you can attach; nor is there any limitation to which format you use.

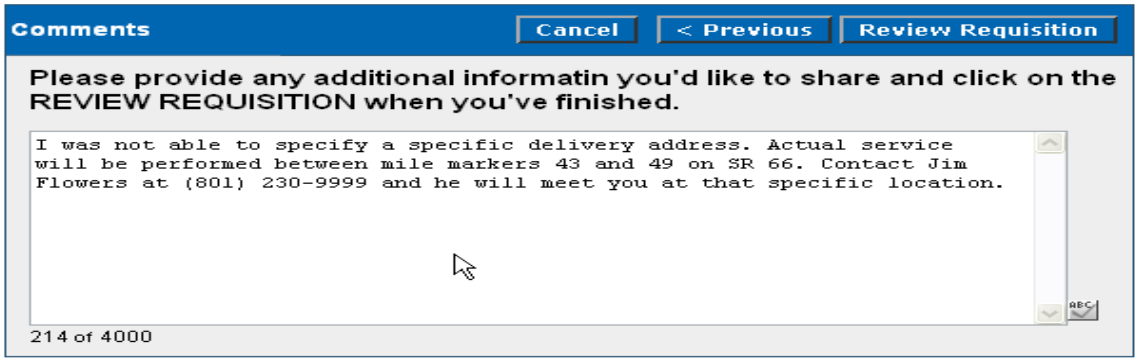
Are there any special instructions or comments…
Your options here are limitless. Let your purchasing agent know a non-mailing address delivery location (between mile marker 42 and mile marker 43); who is the alternate contact if any; justification for the purchase or urgent need, etc. Provide any information you need which was not previously covered in the previous questions.

Attaching Documents (will only appear if you selected yes on the previous screen):

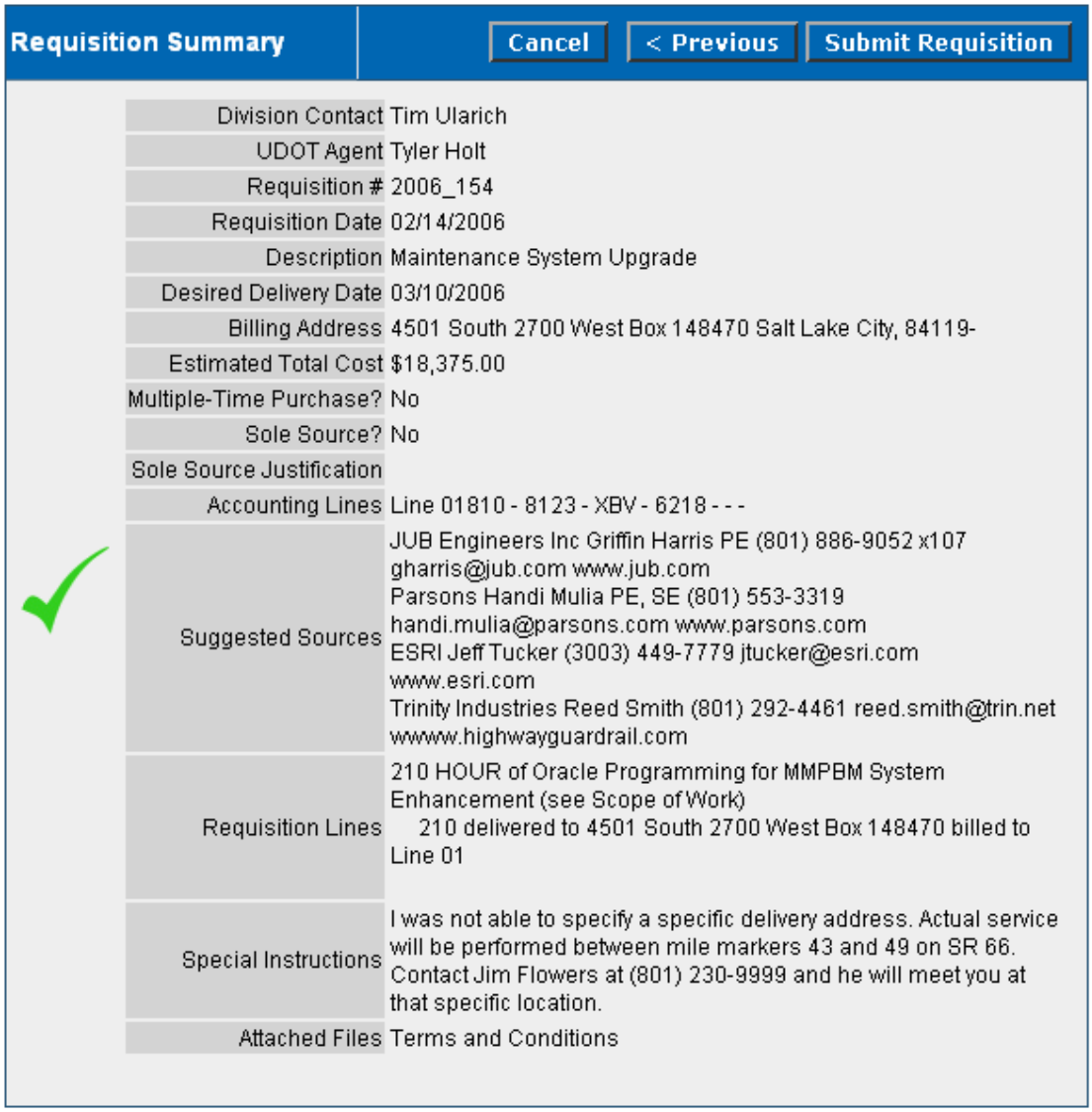


- Perform this function just as you would attach a document to an e-mail. Click “Browse” to locate the file you’re looking for, type in the name of the file, and add a description if it needs further explanation.
- Remember to click “Add File” for each document before clicking “Next.”

Special Instructions/Additional Comments (only appears if you selected yes on the previous screen):



- Include any comments you’d like and click “Review Requisition.” You will then see a summary of all the information you’ve entered, and you will have the option to correct or edit any information.



- This is where you may use the navigation ladder to move back to any areas you may need to correct.
- Once everything is correct and complete, click “Submit Requisition.”
- The requisition will automatically be e-mailed to the purchasing agent you selected, that purchasing agent’s supervisor and the system administrator. You will also receive that e-mail as a confirmation it has been submitted.
- You may not make changes to a requisition after you have submitted it. If the need for a change does occur, e-mail the appropriate purchasing agent to indicate a change is needed.

You should then receive a personal e-mail from your purchasing agent letting you know they received your purchase and are ready to start taking action.

Once you have submitted a requisition, you cannot go back in and change it. Please contact the agent in writing (e-mail) of any revisions that need to be made to the purchase.

▷ View Past Requisitions

You can check on the status of the purchase at any time by clicking on “View Past Requisitions” from the Division User home page. You will see not only the information you entered, but also what the purchasing agent has gone in and entered, allowing you to track your purchase step-by-step through the process.

Requisition Actions Return

Action	Agent	Action Date
Customer Submitted Requisition to UDOT Agent	Debbie Boulton	01/11/2006 01:43

1 - 1

Past Requisitions Return

UDOT Agent	Debbie Boulton
Contact	Tyler Holt
Division	Procurement (Admin)
Requisition Date	11-JAN-06
Fiscal Year	2006
Fy Req No	2006_113
Status	In Progress
Description	olverlay in davis county
Billing Address	4501 South 2700 West 148260 - 2nd Floor Salt Lake City, UT 84119
Delivery Address	4501 South 2700 West 148260 - 2nd Floor Salt Lake City, UT 84119
Accounting Lines	overlay project810 - 1411 - - - - -
Awarded Supplier	
Agency Contract #	
Special Instructions	work will be performed on I-15 MP 323.78 to 324.97
Sole Source Justification	
Purchase Criteria	Any Purchase less than $1K
Purchasing Method	
Purchase Doc Type Id	
PO #	
PO Sent Via	
Total Awarded Price	
State Contract #	
Completion Date	
DGR #	
DGR Justification Memo	
State Agent	Rosemary Frenchwood
State Purch Doc Type	RX
RX #	66-014
Solicitation Type	Formal Bid - Web Posting
Solicitation #	RF6027
State Result	

Any questions?

Please don’t hesitate to call me, or your region’s liaison, for help with any of your purchasing needs.

Tyler Holt: (801) 965-4063; tholt@utah.gov